User Manual: Financial Planning Coordinator

Product: EU-fin - FP7
Version: November 2009

Icons:

Icon	Meaning
	An important remark

Typographic Conventions:

Writing style	Meaning
‘Example » Example’	The menu and submenu item of the coordinator menu.
<Example>	A button in EU-fin
‘Example’	A link in EU-fin

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2. Introduction

You have chosen to use EU-fin to support the financial management and reporting of an fp7 project. After creating your project interface in EU-fin, this will streamline a number of administrative processes and the management of your project will be much easier. In this manual is described how to use EU-fin after set-up.

2.1. Introduction to EU-fin

The EU-fin system has two 'entrances', namely the Coordinator menu and the Beneficiary menu, both connected to the same database. In the coordinator menu a number of project specific parameters are entered, like periods, work packages and beneficiary information. This makes EU-fin fully adapted to the situation of your project.
On the basis of these parameters the beneficiary menu is created, such that a beneficiary finds a tailor-made menu. After log in, the beneficiary finds only the necessary information.
In the beneficiary menu, the financial contact person of a beneficiary can enter the financial planning of the budgets, the actual costs and an explanation of these costs. The Form C calculations are generated by EU-fin.
In the coordinator menu you will find a number of other useful functionalities, like payment administration, form C administration and necessary reports.

2.2. How to use this coordinator manual

The main part of this manual is divided in two parts, first part dealing with a short description on how to use EU-fin. The second part will give a detailed description of the required procedure. Furthermore a chapter on troubleshooting is covering all technical information to help the coordinator overcoming most problems that can be encountered.

2.3. Log-in

You have received your log in information (User name and Password). Go to the EU-fin website by using the link: http://www.eufin-fp7.com and click <Coordinator Menu>. Enter your username and your projects will appear, select the right project from the drop down box. Enter your password and click <Login>.

2.4. Navigation

You will enter the coordinator menu on the 'project' page. On top of each page you will find the navigation panel.

Click on the titles to navigate through the coordinator menu. After clicking on one of these titles a submenu will appear on the left side.

2.5. Session time

EU-fin will automatically close after 1 hour of inactivity, all non-saved data will then be lost. Therefore it is important to save the information you entered regularly.

3. Using EU-fin

3.1. Financial Planning

The financial planning is to be entered in the beneficiary menu: Go to 'Beneficiary » Go to Beneficiary menu'. Each partner has a separate menu, select the partner from the drop down menu and click 'Beneficiary Menu'

In the beneficiary menu the budgets are entered per work package or task, after entering or adjusting budgets, click <Save> before navigating to other work packages or menu's. The coordinator can choose to keep the whole duration column closed for partners. The coordinator defines the whole duration budgets, and partners can't change these, only the period budgets.

3.2. Upload documents

The coordinator can upload documents in the coordinator menu. These documents can be viewed by the beneficiaries in the Beneficiary menu. Go to 'Project » Documents' to upload documents.

3.3. E-mail partners

From the coordinator menu, the coordinator can send e-mails to partners. Go to 'Project » E-mails'. E-mails can be sent to a group of users, or to single users. Attachment cannot be included, but must be uploaded in EU-fin.

3.4. Make reports

In the report section of EU-fin a number of reports are available. In de start up phase, the following reports are helpful:

3.4.1. EC-Contribution and budgets planned

An overview of the planned EC-contribution versus planned budgets. This overview is useful for checking if all assigned budgets are planned (on whole duration level). Go to 'Reports » Datadumps » EC-contribution and budgets planned'.

3.4.2. Whole duration versus periods (Coming soon)

This overview is useful for a quick overview of the whole duration budgets versus the budgets per period. If the whole duration column is closed, partners can only adjust the period budgets. In this overview the totals can be checked. Go to : 'Reports » Datadumps » Whole duration versus periods'.

3.4.3. A3.1

This will export the A3.1's for all partners in the consortium. Go to 'Reports » A3.1 Complete'.

3.4.4. Pivot-tool

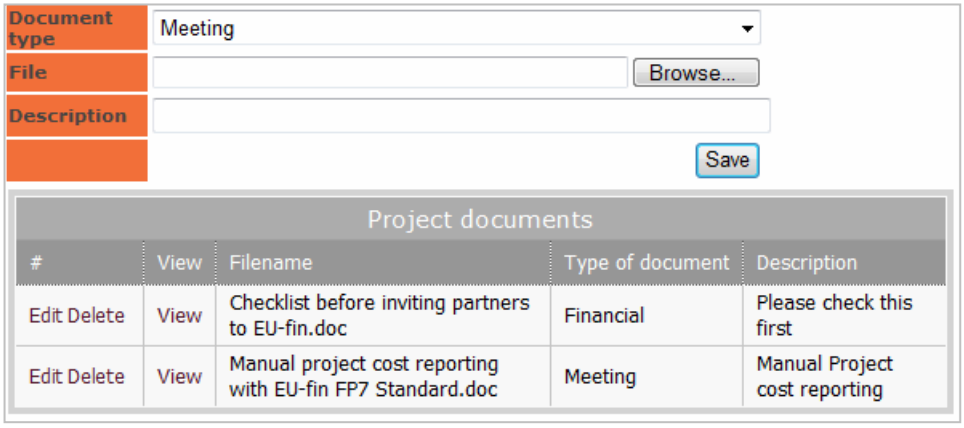
Any report that is not in EU-fin can be generated with this pivot-tool functionality. You can create your own cross section of the data by defining a parameter's location in a table. The generated overview can be optimised in many possible ways. Go to 'Reports » Analysis'.

4. Technical information

4.1. Menu 'Project'

4.1.1. 'Project » Documents'

New! Upload documents into EU-fin. These documents are shown in the beneficiary menu and can be viewed by the beneficiaries.


Document type
Meeting
File
Browse...
Description
Save
Project documents
View Filename Type of document Description
Edit Delete View Checklist before inviting partners to EU-fin.doc Financial Please check this first
Edit Delete View Manual project cost reporting with EU-fin FP7 Standard.doc Meeting Manual Project cost reporting

The procedure for uploading documents:

1. Document type

Choose the type of document from the drop down box

2. File

Browse the file that needs to be uploaded. Click <Browse> and search the file on your computer

3. Description

Enter a description of the uploaded file

Click <Save> to save the uploaded file. A list of uploaded files is shown in the table below. A direct link to the document is shown in this table. This link can be sent to partners for direct access to the document.

4.1.2. 'Project » E-mails'

E-mails can be sent to a group of users, or to single users. Attachment cannot be included, but must be uploaded in EU-fin.
After clicking on 'All project users' or 'One project user' the e-mail editor will appear. In this editor you have to fill in the following information:

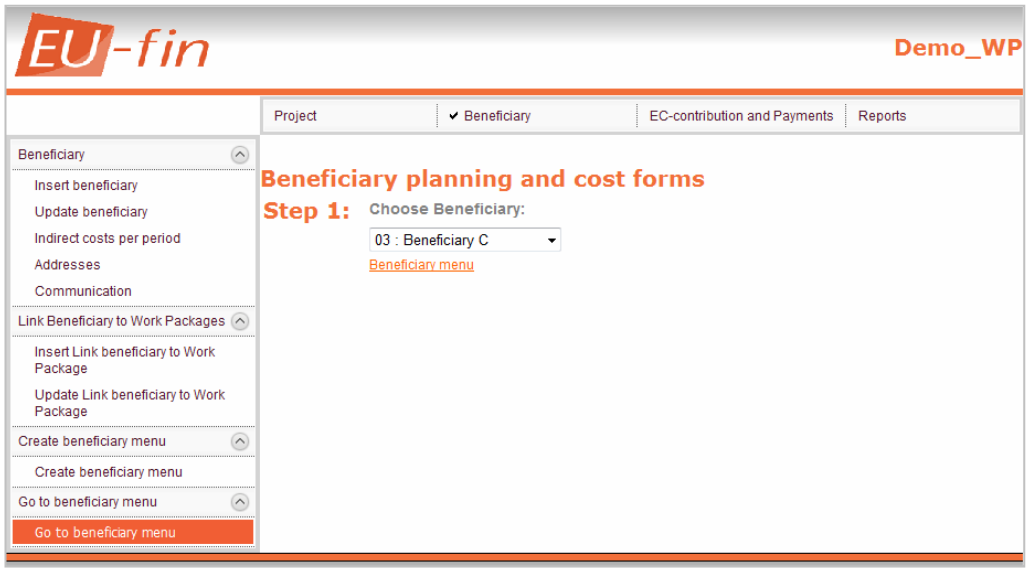
Subject	Enter the subject of the e-mail (the project name will automatically be included in the subject)
To	Select the recipients of the e-mail
With Authorisation	Tick this box to include the personal log-in information of each user
Body text	Enter the text of the e-mail

The body text will be included in the e-mail, as well as a fixed text containing the log in information and the link to EU-fin. The e-mail address of the person (coordinator or assistant) that is logged in in EU-fin is included in the mail as a reply address.

Click on <Send> to send the e-mail.

4.2. Menu 'Beneficiary'

4.2.1. 'Beneficiary » Go to Beneficiary Menu'



Setting up EU-fin will create a personal, tailor-made menu for each beneficiary in the consortium. The coordinator can access each beneficiary's menu from the coordinator menu.

The beneficiary menu that is accessed from the coordinator menu is not the same as the beneficiary menu that the beneficiaries see after log in. To access the actual beneficiary menu, go to the link www.eufin-fp7.com and click <beneficiary menu>.

The procedure for going to the beneficiary menu:

1. Choose Beneficiary

Choose the right beneficiary from the drop down box

2. Beneficiary menu

Click 'Beneficiary menu' to go to the beneficiary menu

The beneficiary menu will pop-up in a new window.

4.3. Menu 'EC Contribution and Payments'

4.3.1. 'EC Contribution and Payments » Insert EC contribution per activity'

The maximum allowable EC contribution is calculated from the planned budgets per work package in the beneficiary menu. The planned EC contribution has to be entered in EU-fin for two reasons, (1) the actual EC contribution can differ from the maximum allowable and (2) the inserted EC contribution serves as a double check for the calculated maximum allowable (and therefore the inserted budgets).

The procedure for entering planned EC contribution

1. Select beneficiary

Select the right beneficiary from the drop down box

2. Activity

Select the right activity type from the drop down box

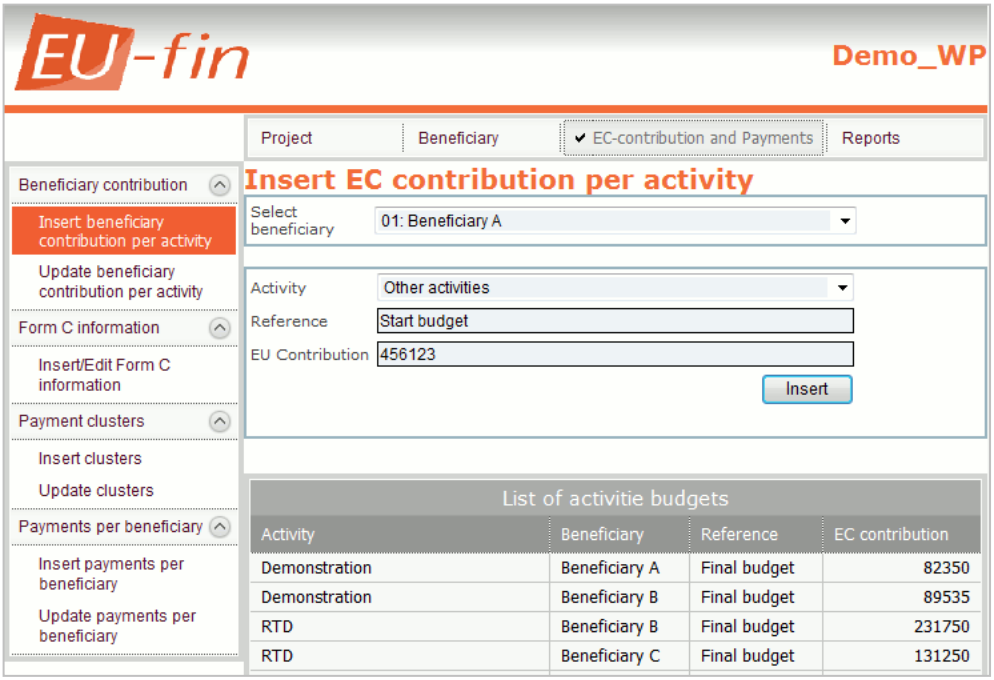
3. Reference

Enter a description of the entered budget

4. EU Contribution

Enter the EC contribution for this activity type

Repeat step 3 & 4 for each activity type of a beneficiary, repeat step 1 – 4 for each beneficiary in the consortium. The inserted EC contribution is shown in the table below after inserting.



5. Troubleshooting

5.1. Helpdesk

The helpdesk is available for any question not answered by this user manual. Send an email to Lia.Wieldraaijer@navigator-eu.com. Please state your project name and describe your problem (including exactly where in the system you encountered the problem).
Print screens can be used for additional information, click print screen (on your keyboard) to make a snapshot of your screen, paste the snapshot into Word (or any other text program) and include this in your mail. The more information you include in your e-mail, the faster we can solve your problem!

Heldesk:
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